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U.S. Commercial Service
United Kingdom Presentation for DNE
December 8, 2022



**U.S.
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United Kingdom Market

- **UK market overview**
- **UK Traveler to USA**
- **What influences UK Travelers**
- **UK Distribution Channels**
- **Recommendations for selling in the UK**
- **Partnering and Resources**

Europe & UK



United Kingdom



Ireland



- European Union (EU): 27 member countries – inc. Ireland
- United Kingdom (UK) left the EU on 31 December 2020





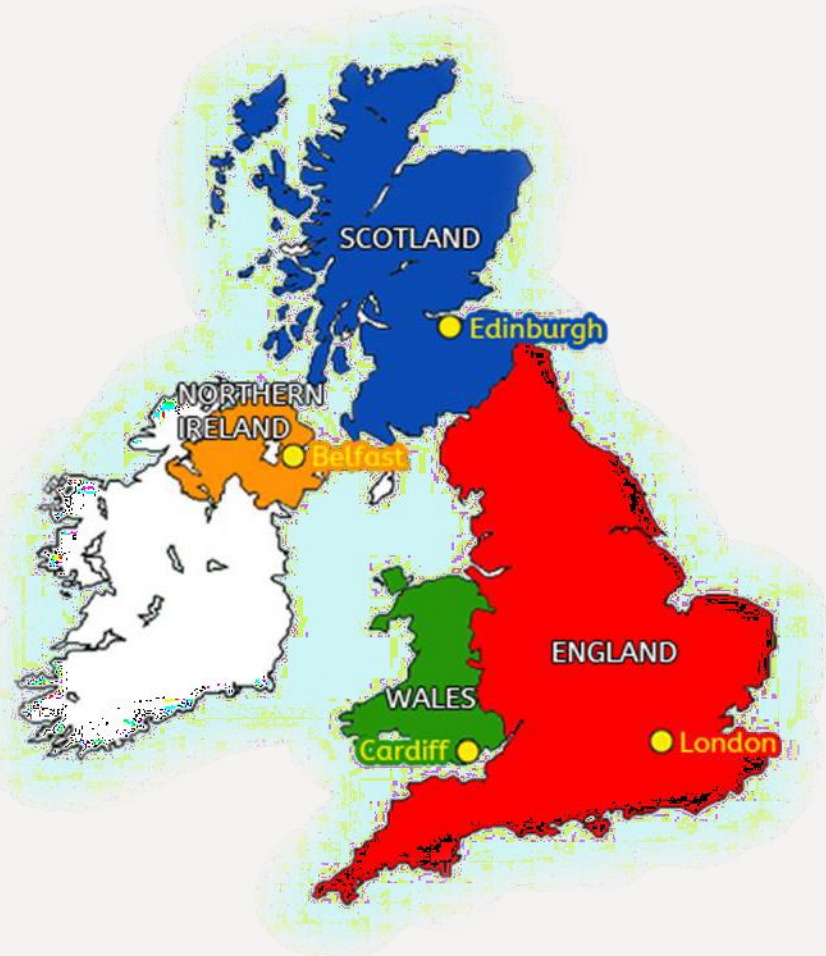
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UK Market

- Population: 67.8 million
- UK Capital: London - Edinburgh, Cardiff and Belfast are the regional capitals for the devolved Scottish, Welsh and Northern Ireland governments
- World's fifth largest economy
- Europe's second largest economy
- No longer a member of the EU, so free to negotiate/sign Free Trade Agreements with any country
- The UK Gov supported businesses during the pandemic; however, the hospitality, travel and tourism were the two sectors that suffered the greatest financial impact 2020-2022. 2022 has seen a healthy recovery, with airlines and tour ops returning to profitability.
- Economic headwinds – cost of living increase due to rising inflation, new tax increases etc. resulting in a decrease in a household's disposable income in 2023



UK Market



- UK central government in London, set rules for all UK businesses, including regulations, standards, taxation etc.

+ Also sets plans/budgets/rules for England

- Devolved governments run their country in relation to matters that are devolved from London, which include: the economy, education, health, justice, rural affairs, housing, environment, equal opportunities, transport and local taxation.



Scotland –Edinburgh



Wales – Cardiff



Northern Ireland - Belfast

United Kingdom Visitors to U.S. - 2019

| | |
|-----------------------|------------------|
| September | 439,892 |
| October | 489,621 |
| Total for 2019 | 4,779,997 |

United Kingdom Visitors to U.S. - 2021

| | |
|-----------------------|----------------|
| September | 13,993 |
| October | 16,760 |
| November | 153,116 |
| December | 198,383 |
| Total for 2021 | 460,749 |

United Kingdom Visitors to U.S. - 2022

| | |
|---------------------------------|------------------|
| September | 340,095 |
| October | 403,609 |
| Total for 2022 (Jan-Oct) | 2,868,912 |



UK Traveler to USA

- The UK is a mature & highly development market; travel and tourism sector is no expectation
- Post-pandemic, the market has seen a migration from direct bookings to using a travel agents/tour operator
- Target audience: affluent families, young professionals and baby boomers (55+) with 4-5 weeks annual leave & peak family travel late July – early Sept
- With no international travel allowed for the past 2 years, there is a pent-up demand to travel internationally
- Independent travelers - city breaks, longer fly-drives tours, experiential trips, discovering America's history
- The UK is by far the largest country for international visitors to the US. In 2019 the figure topped 4.7 million UK, compared with 460K in 2021, the lowest for over 4 decades due to the travel restrictions during the pandemic
- 65.3% of UK travelers visit the U.S. for vacation/leisure purpose in 2019
- Booking patterns have changed. Historically, travelers booked at least 3-6 months, even 12 months in advance. Post-pandemic lead times have shortened considerably, down to 1-3 months. Average stay on a US trip is 14 nights
- Destination US tops the wish list for UK travelers in 2023. Top US destinations are Florida, New York, Las Vegas and California

UK Traveler to USA



- Most popular activities for UK visitor to the US are:
 - General: Shopping, Dining, Sightseeing, Theme Parks, Attractions, National Parks
- UK visitors to New England are more likely to be repeat visitor on their 3rd or 4th trip to the US, and are seasoned travelers who are looking to explore more of the undiscovered America
- Culture, staying in local/boutique hotels/B&B's and authentic dining experiences are a plus
- UK travelers are comfortable renting a car and heading off on a self-drive tour
- Prefer to pay with credit card – travelers do not want to carry cash



What influences UK Travelers

- Print/Digital/social media campaigns – by airlines/tour operators/tourist boards/DMOs to communicate destination/product experiences
- All UK national newspaper include an impressive travel sections, with destination features by respected travel journalists, ads etc., in their weekend editions (Saturday and Sunday), all of which are widely read.
- Respected Influencers, with big followings on their social media channels, who feature posts from their travels
- Experiential, cultural and sustainable elements are now very important considerations in a travelers decision making process
- Ease of access – direct flights vs. traveling via other cities/entry points
- What's included in the package/tour – with the expectation of high safety and service standards

UK Distribution Channels



All have an online presence/booking option

City Breaks • Single Stay • Multi-Centre • Fly Drives • Adventure holidays • Cruise & Stay



Recommendations for selling in the UK

- Accommodation providers recommended to work with a receptive – as majority of tour operators only buy via receptives, for ease for booking/administration
- The UK has some well-established attraction ticket providers (e.g. Attraction World and Attraction Tickets Direct) – they may want to contract directly with providers selling a ticket for an attraction, experience, event, show etc.
- Look at ways to develop partnerships with custom/tailormade tour operators, so they can build your product in to their independent fly-drive or escorted tours itineraries – which they will promote
- Availability is key – with no black-out dates and instant confirmation required
- Tour operators will need preferential rates, which are commissionable or net rates
- Look at co-op marketing opportunities, whether via a partnership with a State/regional tourism organization, Brand USA or a tour operator directly – ensuring they deliver for your ROI
- Tour operators will require any supplier to meet their health and safe regulations and undertake any risk assessments as well as providing local support for clients in an emergency
- Use every opportunity to network and develop relationships with key operators

Partnering / Resources



- **Visit USA Association UK** is a well established and respected travel trade origination for the travel industry promoting/selling destination USA. Membership is open to organizations in the UK and USA. Annual membership is approx. USD 650 and there are many benefits for B2B and B2C engagement. The annual Travel Planner they publish is one example:

<https://www.visitusa.org.uk/travelplanners/2022/>

- **Brand USA** has a European team based in London – they offer co-op marketing opportunities, trade events etc. for export ready travel partners. The Brand USA Travel Week Europe (held annually) facilitates networking/appointments with the key tour operators/agencies across Europe, including the UK

- **IPW** – the UK delegation (buyers and media) is one of the largest at IPW each year – providing engagement opportunities with the key tour operators and media





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